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NIE-40 (Economic)

Textile Fibers

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NIE-40 - TEXTILES

INTRODUCTION

The present analysis is limited to fiber supplies and requirements since the availability of fibers will be the limiting factor in the production of textile goods. Western European processing facilities are adequate to handle considerably larger quantities of textile fibers than are normally available for processing. Soviet Bloc countries should also be able to process all quantities of the fibers that are likely to be available.

Only new fibers are considered; reprocessed fibers are not taken into account although these can provide important quantities of textile fibers, as in Germany during World War II.

Consumption is measured at the processing (spinning mill) rather than the use level except where indicated otherwise. The difference between the two concepts, overseas movements in yarns and fabrics, would tend to disappear as the sea blockade postulated in this study becomes effective. Normally, some quantities of processed fibers in the form of yarns and piece goods are exported outside the Eurasian area by Western European countries. Soviet Bloc nations, on the other hand, usually import limited quantities of processed fibers from outside Continental Europe.

I. CONCLUSIONS

Since Western Europe normally imports about two-thirds of its textile fiber supplies from overseas areas, domestic consumption of textile fibers in the area, currently about 9 kilograms per person, 1/ or three times the per capita consumption in Soviet countries, would

1/ Mill consumption minus net exports of yarns and fabrics.

decline to about the same level as now prevailing in the Soviet Bloc, as imports of cotton, wool, jute, abaca, sisal and henequen are cut off. 1/ Rayon output in Western Europe would decline despite the shortage in apparel fibers, as basic raw materials in short supply (coal, sulphur and sulphuric acid) would be allocated to higher priority uses. Output of flax and hemp would be increased in an attempt to replace imports of hard fibers and jute from overseas sources.

However, in view of ample stocks of textiles and products in the hands of consumers and in distributive channels, Western Europe would not be seriously affected, during the period under consideration, by the sharp reduction of supplies of new textile fibers and products. Further, increased reprocessing of fibers and textile products would alleviate the situation.

The Soviet Bloc is supplying 95 percent of its consumption requirements from domestic production; but per capita domestic consumption 2/ is extremely low--less than 3 kilograms per person. 3/ In the event of a blockade, imports would be sharply reduced, and rayon production would decline slightly; but then losses would be offset by increased production of the natural fibers which are indigenous to the area--cotton, flax, and hemp. In view of the low per capita consumption in the East and low stocks, no significant exports of textile fibers to Western Europe should be anticipated.

II. DISCUSSION

In 1950/51 and 1951/52, almost 2 million metric tons of apparel fibers (cotton, wool and rayon) are being processed by Western European countries. Two-thirds of this is imported from overseas

1/ Present mill consumption in Western Europe is substantially higher as these countries are net exporters of processed fibers.
2/ Mill consumption plus net imports of yarns and fabrics.
3/ Mill consumption is somewhat less as the area is a net importer of processed fibers.

areas. On the other hand, between 10-15 percent is being shipped to overseas markets in the form of yarn and/or fabrics. In 1954, with overseas trade cut off, only 620,000 metric tons of these same apparel fibers would be available for processing. Domestic consumption 1/ would be less than 3 kilograms per capita as compared to 8.1 kilograms per capita in 1951.

In Soviet Bloc countries, almost the entire 1.8 million metric tons of apparel fibers being spun into yarns during 1950/51 and 1951/52 are from indigenous sources. These processed fibers together with imports of yarns and fabrics provide an annual domestic consumption 1/ of less than 3 kilograms per person, roughly one-third the level in Western Europe. Current levels of per capita consumption would be maintained in 1954 with the processing of the entire domestic output of apparel fibers, 1.9 million metric tons.

The quantities of new apparel fibers that would be available in 1954 for domestic use in Western Europe would approach Eastern levels, about 3 kilograms per person. These would be adequate as during the past few years Western European wardrobes have been largely replenished.

In Soviet countries postwar consumption of apparel fibers, on a per capita basis, has been at minimum levels, less than 3 kg. each year, and stocks of clothes and household textiles in the hands of consumers are low. It is likely therefore, that fiber consumption in Eastern Europe would be maintained approximately at present levels, and that no significant net exports to Western Europe would occur.

The major fiber deficit in Western Europe would occur in cotton with supplies virtually disappearing since indigenous production is insignificant, about 10,000 metric tons per year, and movements over land routes from India and Pakistan would be few and costly. In 1954

1/ Mill consumption minus net exports of yarns and fabrics.

cotton consumption in Western Europe would approximate 50,000 metric tons. This is to be compared with a consumption of over 1,100,000 metric tons in 1950/51 and 1951/52.

Wool supplies would also be sharply reduced, declining from 360,000 metric tons in 1951, to about 75,000 metric tons in 1954. Available supplies would be primarily in coarse, carpet type varieties as apparel wools from the Western Hemisphere and Australasia would be cut off by blockade.

This marked reduction in supplies of cotton and wool would probably not be offset by an increase in rayon output. In fact, limitations imposed by raw material shortages would tend to reduce Western European output of rayon, filament and staple, from 575,000 tons to less than 500,000 tons.

Soviet Bloc countries would be able to increase their cotton consumption as indigenous production of this fiber would be increased by some 10 percent. Consumption of cotton would increase between 1951 and 1954 by some 200,000 metric tons, from 1.4 million metric tons in 1951 to 1.6 million metric tons in 1954, on the basis of increased domestic output together with limited imports from India, Pakistan and Egypt.

In the case of wool, consumption in the East would decline almost one-third between 1951 and 1954 from 180,000 metric tons to 130,000 metric tons, as a result of the cutting off of Western Hemisphere and Australasian supplies.

Increasing shortages of industrial chemicals and tightened supplies of coal and petroleum would result in a slight decline in rayon output.

Increased consumption for apparel purposes of indigenously produced hemp and flax in both Western and Eastern Europe to supplement reduced supplies of apparel fibers would be limited. Flax and hemp would be substituted primarily for imported industrial fibers -- jute and the hard fibers (abaca, sisal and henequen). Flax and European

hemp lend themselves to the production of industrial products (twines, rope, cordage, bagging, etc.) although the products are of inferior quality and are more costly than those made from jute and hard fibers.

During the years under consideration in this study, the fiber shortage would not have a significantly adverse effect on either Western Europe or Soviet Bloc countries.

Although virtual disappearance of industrial fibers would create more difficult adjustment problems in the West than in the East, levels of agricultural and industrial activity in Western Europe are not likely to be materially affected by these shortages. Current stocks of industrial fibers and products are high and more systematic efforts would undoubtedly be made to re-use them.

Eastern European consumption of these industrial fibers is already limited by existing controls on East-West trade which greatly reduced imports of jute, abaca, sisal and henequen by Soviet Bloc countries. As a result of this reduced flow, Soviet Bloc nations have tended to utilize indigenously produced fibers, particularly flax and hemp, in the making of rope, cordage, twine, bagging and other industrial products. Soviet Bloc countries will continue as in the past, to make do with the limited quantities of jute and the hard fibers that enter the area in circumvention of the blockade and with indigenously grown flax and hemp. They will not be seriously affected by being cut off from jute and the hard fibers.

Cotton

Western Europe

Western Europe produces insignificant quantities of raw cotton. Less than 1% of the area's consumption requirements -- about 10,000 metric tons -- is produced in Italy, Spain, and Yugoslavia. Requirements for this fiber are covered by overseas suppliers. Consumption of cotton in crop year 1951/52 should continue at 1950/51 levels

despite increased military demands as civilian markets continue to be "soft" and dollar shortages probably restrict French, Italian, and German cotton imports from the US.

With the occupation of the Area by Soviet military forces in mid-1952, overseas supplies would be cut off by blockade. In the following year, consumption would approximate 400,000 metric tons, or a little more than one-third of current consumption levels, as stocks on hand and limited quantities from Egypt, India, and Pakistan are processed. By 1953/54 cotton consumption in Western Europe would be reduced to almost nothing. Stocks in the hands of processors would have been exhausted and only very limited quantities of cotton, no more than 50,000 metric tons, would probably enter from Egypt, Pakistan, and India, via overland routes and blockade running.

Soviet Bloc countries

Cotton output would increase through crop year 1952/53 and decline thereafter. It is estimated that the 1952/53 crop in the USSR, 940,000 metric tons, would be above 1951/52 levels by some 3%. The 1953/54 crop is estimated at 850,000 metric tons, some 10% below the 1952/53 level as food shortages would begin to appear and acreage in Central Asia, an important cotton producing area which is deficient in grains, is diverted from fiber to food production. Reduced fertilizer supplies together with shortages of spare parts for farm machinery, would contribute to a reduction in output. China, on the other hand, should be expected to increase its cotton output through 1953/54 in a determined attempt to meet its goal of self-sufficiency in cotton. Cotton consumption in Russia and its Satellites would continue to increase through 1954. There would be no significant net exports to Western Europe.

Wool

Western Europe

Western European wool output for 1952 is projected at 1951

levels. Thereafter, wool production would be expected to decline as the numbers of sheep would be reduced to meet growing shortages of meat.

Consumption in Western European countries would decline as wool imports are cut off during the second half of 1952. Stocks on hand, plus imports during the first 6 months, plus quantities indigenously produced should provide approximately 250,000 metric tons of wool, clean basis, for consumption during 1952. This represents some 70% of the quantities consumed during the current year, 360,000 metric tons. By 1953 and thereafter, wool consumption would be limited to those quantities which are produced within the area plus some slight imports from Afghanistan and Pakistan. On the average 80,000 metric tons would be available for consumption during each of these 2 years, less than one-fourth the quantities currently processed.

Soviet Bloc Countries

Wool production in these countries would probably increase slightly. Consumption, however, would decline by 25 to 30 percent, from 180,000 metric tons during 1951 and 1952 to 130,000 metric tons in 1954, as imports are cut off. There would be no significant net exports to Western Europe.

Rayon

Western Europe

Rayon production (filament and staple fiber) is expected to increase through 1952, as a result of increased demand for textile products and limited supplies of natural fibers. Output is estimated at 575,000 metric tons in 1951 and 625,000 metric tons in 1952. Annual production in France, Italy and the Federal Republic will approximate 100,000 metric tons, 150,000 metric tons and 175,000 metric tons, respectively, during 1951 and 1952.

After 1952, production would probably decline because of growing shortages of coal, dissolving pulp, sulphur, sulphuric acid and other industrial chemicals. These raw materials would be diverted to higher priority uses. Sulphur and Sulphuric acid would be in particularly short supply. Cellulose would be required in increasing quantities by the munitions industry. However, sufficient rayon to cover military needs and essential civilian requirements would continue to be produced. 1/

After the outbreak of hostilities, the Western European rayon which is normally exported, estimated at about 100,000 metric tons during 1951, would be retained for home consumption. Consumption during 1952 would approximate 575,000 tons or 25% over the 1951 level, in an attempt to compensate for reduced supplies of cotton and wool from overseas. During the next 2 years, however, rayon consumption would probably go down as output is reduced.

Soviet Bloc Countries

Sufficient supplies of energy (coal, petroleum, etc.) and industrial chemicals are expected in the USSR to permit rayon output to continue at 1952 levels of output, 40,000 metric tons. This is slightly above 1951 output estimated at 35,000 metric tons. In other principal rayon producing countries, Eastern Germany, Czechoslovakia and Poland, shortages of sulphur and sulphuric acid would tend to reduce rayon production from current annual levels of 80,000 metric tons, 25,000 metric tons and 20,000 metric tons, respectively. By 1954, rayon output in Bloc countries would

1/ This expectation of decline in production after 1952 is contrary to German and Italian experience during World War II when rayon output was pushed vigorously in order to make up for reduced availabilities of natural textile fibers.

probably decline to 155,000 metric tons as compared with 165,000 metric tons in 1951 and 177,500 metric tons in 1952.

Flax and Hemp

Flax is used in fine linens and also for special purposes where strength, moisture-resistant qualities and durability are required. Hemp was used widely in Western Europe for cordage and cables prior to the advent of the hard fibers. It can also be used as a substitute for jute in bagging. Hemp is also used for twine-making, for oakum, and in producing coarse fabrics for industrial purposes.

Western Europe

Production of both hemp and flax requires a rather high input of labor and fertilizer. Prevailing high prices for cotton, jute and other imported fibers and the dollar shortage have caused Western European output to increase to almost 115,000 metric tons of flax and 130,000 metric tons 1/ of hemp during 1951. A further slight increase is expected through the crop year 1952. After 1952, production of these fibers might be expected to decline because of shortages of fertilizer and the need to divert acreage from industrial fibers to food production.

Flax fiber production in Western Europe amounts to about 100,000 to 110,000 metric tons 1/ per year. Of this amount, France produces about 32,000 metric tons, Belgium about 27,000 metric tons, and the Netherlands 20,000 metric tons.

The principal hemp producing countries in Western Europe are Italy and Yugoslavia. Out of a total hemp production of between 130,000 and 150,000 metric tons 1/ in 1951 and 1952, Italy produces about 75,000 metric tons, and Yugoslavia almost 50,000 tons. France and Spain each produce about 6,000 metric tons and 8,000 metric tons, respectively.

1/ Scutched basis

Normally Western Europe consumes only part of its production of flax fiber as substantial shipments are made to Ireland and the United Kingdom. After 1952, quantities formerly exported would become available for consumption in Western Europe. A limited attempt would be made to extend the use of flax to offset reduced supplies of the apparel fibers (cotton, wool and rayon); but the major effort would be directed at replacing the industrial fibers (jute, sisal henequen, and abaca).

Hemp would continue above 1951 levels through 1954 as Western Europe, particularly France, uses this fiber to make much needed baler and binder twine for agricultural purposes, cordage, rope, etc. normally produced from the hard fibers, and bagging and other industrial products, usually made from jute. During 1953 and 1954, the entire hemp crop produced in Western Europe would be consumed within the area. Yugoslavia and Italy, the principal producers, would probably retain increasing portions of their output for their own use.

Soviet Bloc Countries

Of the more than 600,000 metric tons of flax fibers 1/ produced in Soviet Bloc countries, the USSR and Poland account for over 95 percent. Output in Russia approximates 525,000-550,000 metric tons per year; Polish production approaches 50,000 metric tons each year. After 1952, in spite of increased food requirements, acreage devoted to flax would be maintained because of the great need for it for industrial purposes.

Hemp production in Soviet Bloc countries would continue at about 300,000 metric tons 1/ per year through 1954. Acreage would probably be maintained, as in the case of flax, in an attempt to compensate for reduced supplies of jute, abaca, sisal and henequen.

The Bloc will continue to use up all the flax fiber and hemp fiber it produces.

1/ Scutched basis.

Jute

During the past several years, both Western Europe and Soviet Bloc countries have imported all of their supplies of raw jute from Pakistan. The imported fiber is processed principally in the Low Countries, France, Italy, Germany, and Czechoslovakia. Normally, some of the output is shipped to overseas markets in the Western Hemisphere and the Far East in the form of bagging, yarns, etc.

With the outbreak of hostilities in mid-1952, jute processing would virtually cease in the entire area as supplies of the raw fiber are sharply reduced. Imports via overland or sea routes from Pakistan and India would be severely limited; by 1954, about 50,000 metric tons of jute, at most, would enter Western Europe, as compared with 425,000 metric tons at present. In the East, jute fiber supplies would drop from 75,000 metric tons imported this year to probably no more than 25,000 metric tons in 1954.

Hard Fibers

Western Europe

Abaca (manila hemp), sisal and henequen are referred to commonly as the hard fibers. These tropical crops are not indigenous to either Europe or Asia. Abaca or manila hemp is grown primarily in the Philippine Islands. Sisal is produced in Africa, the Netherlands East Indies and in the Western Hemisphere. The primary source of henequen is Mexico.

Although these fibers are not completely substitutable for each other, they are generally used for the same purposes, the production of marine cordage, ropes, twines and for other industrial purposes. Abaca is the most desirable of these three fibers, lending itself particularly to the production of marine cordage, a military item. Sisal and henequen can also be used for this purpose although the product is not as adequate. Cordage and rope made from these latter

fibers are not as resistant to moisture as is manila (abaca) rope.

Western Europe normally processes about 150,000 tons of hard fibers each year, some of which are exported in product form. Assuming a sea blockade beginning in mid-1952, imports of these fibers from producing areas during 1952 would be reduced to some 100,000 metric tons. Thereafter only those quantities of abaca, sisal and henequen which enter the area via blockade running or overland routes would be available. It is estimated that at best no more than 10,000 tons of these fibers would enter Western Europe by 1954. This sharp reduction in availabilities of the hard fibers, used in industry, agriculture and commerce, would be partially offset by the use of hemp, flax, cotton and synthetics like nylon, and increased reuse of hard fiber products.

Soviet Bloc Countries

Hard fibers are not produced within the Soviet Bloc countries. During the last year or so, export controls over critical and strategic commodities have reduced imports of these fibers into the Soviet area. It is estimated that approximately 25,000 metric tons of abaca, sisal and henequen have entered the Soviet Bloc countries either through overt or covert channels. After the start of hostilities such imports would probably be reduced further, to no more than 5,000 metric tons. However, the effect would not be significant as the area has already developed its use of flax, hemp and cotton as substitutes for hard fibers.

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Table I Supplies and Requirements 1/ of Textile Fibres

(In thousands of metric tons)

	WESTERN EUROPE			SOVIET BLOC			TOTAL		
	Production	Apparent 2/ Consumption	Prod. as % of Consumption	Production	Apparent 2/ Consumption	Prod. as % of Consumption	Production	Apparent 2/ Consumption	Prod. as % of Consumption
Raw Cotton									
1950/51	8.6	1,114.3	0.8	1,426.4	1,417.5	99.2	1,435.0	2,531.8	56.7
1951/52	10.2	1,120.0	0.9	1,556.2	1,505.3	103.2	1,566.4	2,625.3	59.7
1952/53	10.5	400.0	2.6	1,631.5	1,600.0	102.0	1,642.0	2,000.0	82.1
1953/54	10.5	50.0	21.0	1,566.5	1,620.0	97.0	1,577.0	1,670.0	94.4
		INDEX - (1950/51 = 100)							
1951/52	119	101	-	109	106	-	109	104	-
1952/53	122	36	-	114	113	-	114	79	-
1953/54	122	4	-	110	114	-	110	66	-
Raw Wool, clean									
1951	86.1	358.1	24.0	120.1	180.0	66.7	206.2	538.1	38.3
1952	88.8	246.0	36.1	125.6	180.0	62.8	214.4	426.0	50.3
1953	81.15	85.0	95.5	129.8	150.0	100.0	210.95	235.0	89.7
1954	73.25	75.0	97.7	129.8	130.0	100.0	203.05	205.0	99.0
		INDEX - (1951 = 100)							
1952	103	69	-	105	111	-	104	79	-
1953	94	24	-	108	72	-	102	44	-
1954	85	21	-	108	72	-	98	38	-
Rayon (filament & staple)									
1951	575.3	464.3	123.9	165.0	165.0	100.0	740.3	629.3	117.6
1952	623.4	575.0	108.4	177.5	177.5	100.0	800.9	752.5	106.4
1953	556.1	555.0	100	165.0	165.0	100.0	721.1	720.0	100.0
1954	493.3	495.0	100	155.0	155.0	100.0	648.3	650.0	100.0
		INDEX - (1951 = 100)							
1952	108	124	-	108	108	-	108	120	-
1953	97	120	-	100	100	-	97	114	-
1954	86	107	-	94	94	-	88	103	-

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Table I (continued) Supplies and Requirements 1/ of Textile Fibres

(In thousands of metric tons)

	WESTERN EUROPE			SOVIET BLOC			TOTAL		
	Production	Apparent2/ Consumption	Prod. as % of Consumption	Production	Apparent2/ Consumption	Prod. as % of Consumption	Production	Apparent2/ Consumption	Prod.as % of Consumption
Flax Fiber (scutched)									
1951	113.0	86.5	130.6	612.1 a/	610.0 a/	100.0	725.1 a/	696.5 a/	104.1
1952	118.0	100.0	118.0	633.5 a/	635.0 a/	100.0	751.5 a/	735.0 a/	102.2
1953	104.5	105.0	100.0	636.1 a/	636.0 a/	100.0	740.6 a/	740.0 a/	100.0
1954	94.5	95.0	100.0	636.1 a/	635.0 a/	100.0	730.6 a/	730.0 a/	100.0
		INDEX - (1951 = 100)							
1952	104	116	-	103	104	-	104	106	-
1953	92	121	-	104	104	-	102	106	-
1954	84	110	-	104	104	-	101	105	-
Hemp Fiber (scutched)									
1951	128.5	116.8	110.0	288.9	290.0	100.0	417.4	406.8	102.6
1952	147.6	120.0	123.0	296.5	295.0	100.0	444.1	415.0	107.0
1953	135.6	135.0	100.0	300.0	300.0	100.0	435.6	435.0	100.0
1954	124.0	125.0	100.0	300.0	300.0	100.0	424.0	425.0	100.0
		INDEX - (1951 = 100)							
1952	115	130	-	103	102	-	106	102	-
1953	106	116	-	104	103	-	104	107	-
1954	96	107	-	104	103	-	102	104	-
Raw Jute									
1950/51	0	420.0	0	0	475.0	0	0	495.0	0
1951/52	0	300.0	0	0	50.0	0	0	350.0	0
1952/53	0	50.0	0	0	25.0	0	0	75.0	0
1953/54	0	50.0	0	0	25.0	0	0	75.0	0
		INDEX - (1950/51 = 100)							
1951/52	-	71	-	-	67	-	-	71	-
1952/53	-	12	-	-	33	-	-	15	-
1953/54	-	12	-	-	33	-	-	15	-

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Table I (continued) Supplies and Requirements 1/ of Textile Fibers

(In thousands of metric tons)

	WESTERN EUROPE			SOVIET BLOC			TOTAL		
	Production	Apparent 2/ Consumption	Prod. as % of Consumption	Production	Apparent 2/ Consumption	Prod. as % of Consumption	Production	Apparent 2/ Consumption	Prod. as % of Consumption
Hard Fibers (abaca, sisal, and henequen)									
1951	0	150.0	0	0	25.0	0	0	175.0	0
1952	0	100.0	0	0	12.5	0	0	112.5	0
1953	0	25.0	0	0	5.0	0	0	30.0	0
1954	0	10.0	0	0	5.0	0	0	15.0	0
		INDEX - (1951 = 100)							
1952	-	67	-	-	50	-	-	64.0	-
1953	-	17	-	-	20	-	-	17.0	-
1954	-	7	-	-	20	-	-	9	-
TOTAL Fibers									
1951	911.5	2,710.0	33.6	2,612.5	2,762.5	94.6	3,524.0	5,472.5	64.3
1952	988.0	2,561.0	38.6	2,789.3	2,855.3	97.7	3,777.3	5,416.3	69.7
1953	887.85	1,355.0	65.5	2,862.4	2,880.0	99.4	3,750.25	4,235.0	88.6
1954	795.55	900.0	88.4	2,787.4	2,870.0	97.1	3,582.95	3,770.0	95.0
		INDEX - (1951 = 100)							
1952	108	95	-	107	103	-	107	99	-
1953	97	50	-	110	104	-	106	77	-
1954	87	33	-	107	104	-	102	69	-

1/ Mill Consumption; not quantities available for use as no adjustment is made for net exports of yarns and fabrics.
2/ Apparent Consumption = Production ± Net Trade in fibers.
a/ Communist China data include flax, hemp and ramie.

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Table 2

Raw Cotton (ginned) - Estimated Production, Mill Stocks, and Mill Consumption in Selected Western European Countries 1/

(1,000 metric tons)

Country	Production 1951	1952	Peak War II	Mill Stocks Aug. 1, 1951	Aug. 1, 1952	Production 1953	1954	Mill Consumption 1951	1952	1953	1954
Austria	0	0	0	7.9	8.0	0	0	20.6	22.5	10.0	)
Belgium	0	0	0	27.7	30.0	0	0	105.2	110.0	30.0	)
Denmark	0	0	0	2.7	2.75	0	0	10.4	11.0	2.75	)
Finland	0	0	0	2.4	2.5	0	0	11.5	11.5	2.5	)
France	0	0	0	68.9	150.0	0	0	260.2	275.0	125.0	)
Italy	2.6	3.8	5.8	81.9	85.0	4.0	4.0	211.4	200.0	100.0	)
Netherlands	0	0	0	15.7	17.5	0	0	65.0	70.0	17.5	) 50.0
Norway	0	0	0	0.7	0.7	0	0	5.0	5.0	1.0	)
Portugal	0	0	0	5.1	7.5	0	0	34.7	37.5	7.5	)
Spain	4.1	5.0	6.7	11.8 a/	12.5 a/	5.0	5.0	65.0	75.0	12.5	)
Sweden	0	0	0	10.0	12.5	0	0	29.3	32.5	12.5	)
Switzerland	0	0	0	19.2	20.0	0	0	32.5	32.5	25.0	)
Fed. Rep.-Germany	0	0	0	37.5	45.0	0	0	227.7	200.0	50.0	)
Yugoslavia	1.9	1.4	n a	1.1	1.5	1.5	1.5	35.8	37.5	3.75	)
Total	8.6	10.2	n a	292.6	395.45	10.5	10.5	1,114.3	1,120.0	400.0	50.0

1/ Data relate to crop year ending July 31.
a/ Includes stocks, at Customs, awaiting clearance.
n a Not available.

Source: Embassy Reports primarily, supplemented by International Cotton Advisary Council data.

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Table 3

17.

Raw Cotton (ginned) - Estimated Production, Mill Stocks, and Mill Consumption in Soviet Bloc Countries 1/
(1,000 metric tons)

Country	Production			Mill Stocks		Production		Mill Consumption			
	1951	1952	Peak War II	Mid-1951	Mid-1952	1953	1954	1951	1952	1953	1954
USSR	871.0	910.0	651.0	n.a.	198 a/	940.0	850.0	565.0	600.0	650.0	675.0
Poland	0	0	0	n.a.	)	0	0	87.0	93.5	100.0	90.0
Czechoslovakia	0	0	0	n.a.	)	0	0	65.0	67.5	70.0	65.0
Germany, East	0	0	0	n.a.	)	0	0	25.0	27.5	30.0	25.0
Hungary	0.6	3.4	n.a.	n.a.	)	3.6	3.6	30.0	32.5	35.0	30.0
Rumania	3.2	4.0	4.7	n.a.	) negl.	4.6	4.6	20.5	21.5	22.5	20.0
Bulgaria	5.4	6.5	7.8	n.a.	)	7.1	7.1	15.0	15.8	16.5	15.0
Albania	1.2	1.2	n.a.	n.a.	)	1.2	1.2	negl.	negl.	negl.	negl.
China 2/	545.0	631.1	540.0	n.a.	)	675.0	700.0	610.0	650.0	675.0	700.0
No. Korea	0	0	0	n.a.	)	0	0	negl.	negl.	negl.	negl.
Total	1,426.4	1,556.2		n.a.	200.0	1,631.5	1,566.5	1,417.5	1,505.3	1,600.0	1,620.0

1/ Data relate to crop year ending July 31.
2/ Includes Inner Mongolia.
a/ Represents net surplus of cotton supplies over apparent consumption for the 3 year period, 1948-51.

negl. - negligible
n.a. - not available.

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SECRET - SECURITY INFORMATION

Table 12

Raw Jute - Estimates of Apparent Consumption 1/
in Selected Western European Countries

(1,000 metric tons)

Country	1951	1952	1953	1954
Austria	2/	2/		
Belgium	100.0	75.0		
Denmark	2/	2/		
Finland	2/	2/		
France	100.0	75.0		
Italy	100.0	75.0		
Netherlands	2/	2/	50.0	50.0
Norway	2/	2/		
Portugal	2/	2/		
Spain	2/	2/		
Sweden	2/	2/		
Switzerland	2/	2/		
Fed. Rep.-Germany	75.0	50.0		
Yugoslavia	2/	2/		
Total	420.0	300.0	50.0	50.0

1/ Apparent Consumption = Production $\pm$ Net Trade.
2/ Included in Total.

SECRET - SECURITY INFORMATION

Table 13

Raw Jute - Estimates of Apparent Consumption 1/
in Soviet Bloc Countries

(1,000 metric tons)

Country	1951	1952	1953	1954
USSR	20.0			
Poland	12.5			
Czechoslovakia	15.0			
Germany, East	2/			
Hungary	2/	50.0	25.0	25.0
Rumania	2/			
Bulgaria	2/			
Albania	2/			
China 3/	10.0			
No. Korea	2/			
Total	75.0	50.0	25.0	25.0

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Table 14

Hard Fibers (abaca, sisal and henequen). Estimates of Apparent Consumption 1/ in Selected Western European Countries

(1,000 metric tons)

Country	1951	1952	1953	1954
Austria	3.0			
Belgium	30.0			
Denmark	12.5			
Finland	2/			
France	40.0			
Italy	2/			
Netherlands	5.0			
Norway	2/	100.0	25.0	10.0
Portugal	5.0			
Spain	2/			
Sweden	2.5			
Switzerland	2/			
Fed.Rep.-Germany	40.0			
Yugoslavia	2/			
Total	150.0	100.0	25.0	10.0

1/ Production ± Net Trade = Apparent Consumption.
2/ Included in Total.

Table 15

Hard Fibers (abaca, sisal and henequen) - Estimates of Apparent Consumption 1/ in Soviet Bloc Countries

(1,000 metric tons)

Country	1951	1952	1953	1954
USSR				
Poland				
Czechoslovakia				
Germany, East				
Hungary	25.0	12.5	5.0	5.0
Rumania				
Bulgaria				
Albania				
China 2/				
No. Korea				
Total	25.0	12.5	5.0	5.0

1/ Production + Net Trade = Apparent Consumption.

2/ Includes Inner Mongolia.